

## CA-PMM

**Project Name:** Electronic Services Expansion Project

**OCIO Project #:** 0860-091

**Department:** Board of Equalization

**Revision Date:** August 2009 Report

## Status Report

### Progress Report -- Team Member to Project Manager

#### Current Task Summary

Task or Deliverable	Scheduled Completion Date	Actual Completion Date	Issues?
<b>Accomplished this week</b>			
<b>Planned/Scheduled Completion in Next Two Weeks</b>			
<b>Status Summary</b>	<b>Yes/No</b>	<b>Explanation</b>	
Will all assigned tasks be accomplished by their due date?			
Are there any planned tasks that won't be completed?			
Are there problems which affect your ability to accomplish assigned tasks?			
Do you plan to take time off that is not currently scheduled?			

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### Status of Assigned Issues

Issue Number	Description	Due Date	Status

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### Status Report – Project Manager to Sponsor

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#### Current Status Report

Questions	Yes/No	Cause	Impact	Action Required
1. Were recent milestones completed on schedule?	Yes			
2. Were any key milestones or deliverables rescheduled?	No			
3. Was work done that was not planned?	Yes	Mandated ABx 4 18 FY 2009-10 Trailer	Adjustment to project schedule, increase in scope	Update project schedule
4. Were there any changes to scope?	Yes	Mandated ABx 4 18 FY 2009-10 Trailer	Increase in project scope	Update project charter
5. Were tasks added that were not originally estimated?	Yes	Mandated ABx 4 18 FY 2009-10 Trailer	Additional tasks need to be added to the project	Update project schedule
6. Were any tasks or milestones removed?	No			
7. Were any scheduled tasks not started?	No			
8. Are there any new major issues?	No			
9. Are there any staffing problems?	No			

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### Look Ahead View

Questions	Yes/No	Impact	Action Required
1. Will upcoming critical path milestones or deliverables be delayed?	No		
2. Do any key milestones or deliverables need to be rescheduled?	No		
3. Is there any unplanned work that needs to be done?	No		
4. Are there any expected or recommended changes to scope?	No		
5. Are there any tasks not originally estimated that will need to be added?	No		
6. Are there any tasks or milestones that should be removed from the plan?	No		
7. Are there any scheduled tasks whose start will likely be delayed?	No		
8. Are any major new issues foreseeable?	No		
9. Are any staffing problems anticipated?	No		

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### Current Status and Accomplishments:

*Describe deliverables completed and milestones met during **this reporting period**.*

Sub Project "eFiling for Fuel Retailers and Distributors (G/SG)"

Physical Design Phase Completed

Construction Phase Began

Sub Project "Electronic Registration (eReg)"

### Project Milestones:

*List key milestones and their dates from the project schedule.*

Milestone	Target Date	Forecast Date	Status	Cause & Impact to Implementation Date	Date Completed
G/SG - Physical Design Phase	8/20/09	8/20/09	Complete		
Cig Mgr/Dist - Conceptual Phase	8/29/09	8/26/09	Complete		
Service Business - Conceptual Phase	8/25/09	8/25/09	Complete		

### Variances

Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance".

	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	x			
Milestones	x			
Deliverables	x			
Resources	x			
OneTime Cost	x			
Continuing Cost	x			

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### Status Reports – Sponsor to Steering Committee

#### Summary Milestones and Highlights

<b>Project Milestones:</b> <i>List key milestones and their dates from the project schedule. Explain in issues section if a milestone's status is behind.</i>					
Milestone	Target Date	Forecast Date	Status	If Delayed, Impact to Implementation Date	Date Completed
G/SG - Physical Design Phase	8/20/09	8/20/09	Complete		
Cig Mgr/Dist - Conceptual Phase	8/29/09	8/26/09	Complete		
Service Business - Conceptual Phase	8/25/09	8/25/09	Complete		

<b>Variances</b> Check the appropriate box for each project element listed below. Please describe the actions you plan to take for those items marked "Caution" or "Significant Variance". <i>* Priority of schedule, scope, budget, and quality from Final Ranking established in the Priority Analysis</i>				
	On Plan <5%	Caution 5-10%	Significant Variance >10%	Action Required
Schedule	x			
Milestones	x			
Deliverables	x			
Resources	x			
One Time Cost	x			
Continuing Cost	x			

**CA-PMM****Project Name:** Electronic Services Expansion Project**OCIO Project #:** 0860-091**Department:** Board of Equalization**Revision Date:** August 2009 Report**Status Report****Monitoring Vital Signs Scorecard**

Vital Sign	Variance	Value	Your Score
1. Customer Buy-In	High Degree of Buy-In	0	0
	Medium Degree of Buy-In	1	
	Low Degree of Buy-In	2	
2. Technology Viability	Strong Viability	0	0
	Medium Viability	1	
	Weak Viability	2	
3. Status of the Critical Path (delay)	<5%	0	0
	5% to 10%	1	
	>10%	2	
4. Cost-to-Date vs. Estimated Cost-to-Date (higher)	<5%	0	0
	5% to 10%	1	
	>10%	2	
5. High-Probability, High-Impact Risks	0 to 3	0	1
	4 to 6	1	
	>6	2	
6. Unresolved Issues (on time resolution)	On time	0	0
	Late with no impact	1	
	Late impacting the critical path	2	
7. Sponsorship Commitment	Fully engaged	0	0
	Partially engaged	1	
	Inadequate enagement	2	
8. Strategy Alignment	Strong alignment	0	0
	Partial alignment	1	
	Weak or no alignment	2	
9. Value-to-Business	Strong	0	0
	Medium	1	
	Weak	2	

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10. Vendor Viability (provide rationale for the rating in the field following the scorecard)	Strong	0	1
	Medium	1	
	Weak	2	
11. Milestone Hit Rate (rate of achievement as planned)	>90% on time	0	0
	80-90% on time	1	
	<80% on time	2	
12. Deliverable Hit Rate (rate of production as planned)	>90% on time	0	0
	80-90% on time	1	
	<80% on time	2	
13. Actual vs. Planned Resources	>90% assigned and available	0	0
	80-90% assigned and available	1	
	<80% assigned and available	2	
14. Overtime Utilization (% of effort that is overtime)	<15%	0	0
	15-25%	1	
	>25%	2	
15. Team Effectiveness	Highly Effective	0	0
	Moderately Effective	1	
	Ineffective	2	
<b>Total</b>			<b>2</b>

Green = 0 - 8

Yellow = 9 - 19

Red = 20+

**Vendor Viability Rating Rationale**

The ESEP project team is comprised of BOE staff and a large number of contract resources (system analysts, programmers, Technology Project Manager). BOE systems